

May 1, 2008

TO: Cari Trussell
Employee Relations Specialist
Washington Public Employees Association (WPEA)

FROM: Teresa Parsons
Director's Review Program Supervisor

SUBJECT: Julie Evenstad v. Olympic College (OC)
Allocation Review Request ALLO-07-042

On March 27, 2008, I conducted a Director's review meeting at the Department of Personnel, 2828 Capitol Boulevard, Olympia, Washington, concerning the allocation of Ms. Evenstad's position. Present at the Director's review meeting were you, Ms. Evenstad, Karen Fusco, Director of Access Services and Ms. Evenstad's supervisor, and Human Resource Consultant Jacquie Curry from Olympic College.

Background

On December 7, 2006, Ms. Evenstad submitted a Position Questionnaire (PQ) to Olympic College's Human Resources (HR) Office, requesting that her Program Assistant position be reallocated to the Program Coordinator classification. By memorandum dated April 30, 2007, Ms. Curry determined that the majority of Ms. Evenstad's duties and responsibilities fit the Program Assistant classification.

On May 31, 2007, the Department of Personnel received your letter, on behalf of Ms. Evenstad, requesting a Director's review of Olympic College's allocation determination.

On March 19, 2008, I sent a letter to you and Ms. Curry addressing the timeliness of Ms. Evenstad's request. By letter dated March 24, 2008, you responded to the issue of timeliness by indicating that the HR office called Ms. Evenstad on May 3, 2007, to inform her she could pick up the allocation determination, which was supported by a telephone log. Olympic College did not dispute that Ms. Evenstad picked up the

determination on May 3, 2007. Therefore, I concluded Ms. Evenstad's request for a Director's review was in fact timely filed.

Summary of Ms. Evenstad's Perspective

Ms. Evenstad asserts that she coordinates the daily functions for the Access Services Program at Olympic College, which includes three campuses. As such, Ms. Evenstad states that she has extensive involvement with students, staff, the public, and other agencies in an effort to make accommodations for students requiring disability services. Ms. Evenstad contends that she coordinates the intake process, explains procedures and policies, assists students and program users, and makes arrangements for accommodation aides, such as interpreters, note takers, and real time captioners. Ms. Evenstad further contends she schedules and directs the work of these individuals, as well as a part-time office assistant and, at times, work study students. In addition, Ms. Evenstad states that she coordinates the set up for specific accommodations relating to furniture or equipment for a particular classroom setting.

Ms. Evenstad asserts her duties include researching various options related to alternate methods of accommodation and states that she provides recommendations that support students, as well as instructors. As a result, Ms. Evenstad contends she has extensive knowledge about services offered through Access Services. Ms. Evenstad asserts she works with outside vendors and contractors, such as interpreter services. As an example, Ms. Evenstad states she coordinates with Tacoma Community College to acquire specialized equipment through their affiliation with a program producing specialized equipment at the Washington Corrections Center for Women. Besides coordinating with vendors, Ms. Evenstad states she initiates purchase requisitions and tracks, reviews, and processes invoices. Ms. Evenstad states she also monitors program expenditures. Overall, Ms. Evenstad believes the Program Coordinator classification describes the duties and responsibilities assigned to her position.

Summary of OC's Reasoning

OC acknowledges that some of Ms. Evenstad's assigned duties fall within the Program Coordinator classification but asserts the primary duties assigned to her position involve program support and assistance. OC asserts many of Ms. Evenstad's duties involve providing clerical or technical support for the Access Services program. As an example, OC states that Ms. Evenstad has responsibility for facilitating the intake process, to include obtaining documents, scheduling, and coordinating student accommodations. OC asserts that providing information to students, staff, participants, and the public is in line with the duties encompassed in the Program Assistant classification. In that role, OC contends Ms. Evenstad serves as the primary contact for Access Services, assists with paperwork, answers questions about the program, tracks and maintains records, monitors equipment, and directs the work of a part-time office assistant, work study positions, or accommodations assistants, such as note takers.

While OC acknowledges that some of the coordination regarding student accommodations may fit in the Program Coordinator classification, OC believes the majority of her assigned duties and responsibilities fit within the Program Assistant classification. Additionally, OC recognizes that Ms. Evenstad may project, initiate, and track expenditures, which may be considered higher-level duties, but the college does not view these tasks as primary responsibilities assigned to her position. OC also notes that budget related duties are not performed independent from the supervisor. OC believes the majority of Ms. Evenstad's assigned duties and responsibilities are at the Program Assistant level.

Director's Determination

This position review was based on the work performed for the six-month period prior to December 7, 2006, the date Ms. Evenstad submitted her reallocation request with Olympic College.

As the Director's designee, I carefully considered all of the documentation in the file, the exhibits presented during the Director's review meeting, and the verbal comments provided by both parties. Based on my review and analysis of Ms. Evenstad's assigned duties and responsibilities, I conclude her position should be reallocated to the Program Coordinator classification.

Rationale for Determination

The purpose of a position review is to determine which classification best describes the overall duties and responsibilities of a position. A position review is neither a measurement of the volume of work performed, nor an evaluation of the expertise with which that work is performed. A position review is a comparison of the duties and responsibilities of a particular position to the available classification specifications. This review results in a determination of the class that best describes the overall duties and responsibilities of the position. See Liddle-Stamper v. Washington State University, PAB Case No. 3722-A2 (1994).

The majority of Ms. Evenstad's work assignments, as described on the PQ, can be summarized as follows:

- 40% Facilitating the intake process and coordinating student accommodations. This includes scheduling student intakes and attaining proper medical documentation, as well as coordinating the various requests for accommodation, which may include academic adjustments, auxiliary aids, note takers, or interpreters. Performing these duties involves communicating with staff, faculty, independent contractors, textbook publishers, and recording agencies.

- 25% Providing program and fiscal administrative support, which includes assuming responsibility for tracking and maintaining student information using multiple databases; tracking expenditures; and monitoring and reconciling program budgets. These duties also involve researching specific furniture or equipment needs for student accommodations; monitoring equipment loans; updating policies and procedures for the program; and updating the website.
- 20% Providing customer service through accurate information and providing assistance to faculty, staff, students, local agencies, schools, the medical community, and the general public about the program, including public presentations.

When performing the above duties, Ms. Evenstad exercises independent judgment, interprets and applies policies and procedures, and has extensive involvement with program participants. Ms. Evenstad also spends 15% of her time recruiting and hiring the accommodation assistants, which involves planning, overseeing, and scheduling the work. Ms. Evenstad may also direct the work of others.

During the Director's review conference, Ms. Evenstad's supervisor, Ms. Fusco, confirmed that Ms. Evenstad has responsibility for coordinating the majority of program services and that she provides specialized consultation and technical assistance to students, staff, and outside agencies. Ms. Fusco further indicated that Ms. Evenstad works extensively with students for the provision of direct services, and coordinates with the various entities to ensure accommodations are met. Ms. Fusco's statements are further supported by her written answers to the management portion (Part III) of the PQ.

In considering the various classifications, I determined the scope of Ms. Evenstad's duties fit the program class concept rather than the clerical and secretarial concept.

The Department of Personnel Glossary of classification terms defines a program as:

A specialized area, which has specific complex components and discrete tasks that distinguish it from other programs (or the main body of an organization). A program is specific to a particular subject and has a specific mission, goals, and objectives. A program typically has an identifiable funding source and separate budget code.

The specific components and discrete, specialized tasks involve interpretation of policies, procedures and regulations, budget coordination/administration, independent functioning, and typically, public contact relating specifically to program subject matter, clients and participants.

Duties are not of a general support nature transferable from one program to another. Performance of clerical duties is in support of incumbent's performance of specialized tasks. Independent performance of the specialized tasks usually requires a training period of not less than six months.

Access Services meets the definition of a program. The class series concept for the program classifications states:

Perform work requiring knowledge and experience that is specific to a program. Organize and perform work related to program operations independent of the daily administrative office needs of the supervisor. Represent the program to clients, participants and/or members of the public.

Ms. Evenstad's position fits within the class series concept for the program classifications. When considering the various classifications, I did not find that Ms. Evenstad's duties fit the definition of the Program Manager A or B, which requires supervision of a division of a major administrative department, operating unit or program undertaking relieving the senior official of operating and administrative detail. Ms. Fusco serves as the Director of Access Services and reports to the Dean of Student Development. Additionally, I did not find that Ms. Evenstad's duties fit the definition or distinguishing characteristics of the Program Support Supervisor I or II classifications because her position has not been assigned a level of supervisory responsibility consistent with the following definition of supervisor (Department of Personnel Glossary of Classification Terms):

An employee assigned responsibility by management to participate in all of the following functions with respect to their subordinate employees: (1) selection of staff, (2) training and development, (3) planning and assignment of work, (4) evaluating performance, (5) adjusting grievances, and (6) taking corrective action.

The basic function for the Program Assistant states that positions "[p]erform specialized technical/clerical duties in support of a program activity. The distinguishing characteristics indicate the following:

Under general supervision, perform work requiring knowledge and experience specific to the program. Provide students, staff, program participants and/or the public with information and interpretation of policies and activities related to the program specialty. Compose written communications, and establish and maintain records relating to program operations.

The basic function for the Program Coordinator classification states that positions "[c]oordinate the operation of a specialized or technical program." The Washington State

Glossary of Classification Terms defines coordinate as independently organizing, monitoring, evaluating, and making adjustments for a program or activity without supervisory responsibility over program or activity participants.

The distinguishing characteristics of a Program Coordinator include the following:

Under general direction, perform work using knowledge and experience specific to the program. Exercise independent judgment in interpreting and applying rules and regulations. Independently advise students, staff, program participants and/or the public regarding program content, policies, procedures and activities; select/recommend alternative courses of action and either:

- Project, monitor, maintain, initiate and/or approve expenditures on program budgets

OR

- Have extensive involvement with students, staff, the public and/or agencies in carrying out program activities, and coordinate, schedule and monitor program activities to determine consistency with program goals.

Ms. Evenstad not only performs specialized duties in support of the Access Services, she has extensive involvement in coordinating the functions of the program. In that capacity, she acts as a liaison and program resource, working with various outside agencies and contractors, and she has extensive involvement with staff, students, and faculty to ensure accommodations are in place. Ms. Evenstad oversees the day to day operations of the program, which includes assigning, scheduling, and directing the work of the part-time office assistant, potential work study students, and accommodation aides. Ms. Evenstad's level of responsibility exceeds the level of a Program Assistant.

While examples of work do not form the basis for an allocation, they lend support to the work envisioned within a classification. The typical work examples of the Program Coordinator classification most in line with Ms. Evenstad's assigned duties include the following:

Within the specialized program:

- Monitor budget status in line with program activities;
- Provide information and advice to students, staff, program participants and/or the public regarding program content, policies and activities,

recommend alternative courses of action; promote the program on campus with outside organizations;

- Attend meetings and/or conferences as program representative;
- Confer regularly with representatives of off-campus organizations and agencies regarding the interpretation and implementation of program and institutional policies;
- Monitor program activities in relation to established program goals; within established program parameters, determine variance from program standards;
- Direct the work of others;
- May make public presentations related to program specialty.

Based on the overall assignment of duties and the scope and level of responsibility assigned to Ms. Evenstad's position, the Program Coordinator classification best describes her position.

Appeal Rights

RCW 41.06.170 governs the right to appeal. RCW 41.06.170(4) provides, in relevant part, the following:

An employee incumbent in a position at the time of its allocation or reallocation, or the agency utilizing the position, may appeal the allocation or reallocation to . . . the Washington personnel resources board Notice of such appeal must be filed in writing within thirty days of the action from which appeal is taken.

The address for the Personnel Resources Board is 2828 Capitol Blvd., P.O. Box 40911, Olympia, Washington, 98504-0911.

If no further action is taken, the Director's determination becomes final.

c: Julie Evenstad
Jacquie Curry, OC

Enclosure: List of Exhibits